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CLARE NOVAK

ENGENDERING UTILITIES

Increasing Women's Participation in the Power Sector through Human Resources Interventions: A Best Practices Framework

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DISCLAIMER

The authors' views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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ABBREVIATIONS

AHRI	Australian HR Institute
ATD	Association for Talent Development
DISCO	distribution company
EDCO	Electricity Distribution Company (Jordan)
EEO	Equal Employment Opportunity
EKEDP	Eko Electricity Distribution PLC (Nigeria)
EVN	EVN Macedonia
GBV	gender-based violence
GDP	gross domestic product
GEELP	Gender Equity Executive Leadership Program
HR	human resources
HRIS	HR Information System
IBEDC	Ibadan Electricity Distribution Company (Nigeria)
IDECO	Irbid District Electricity Company (Jordan)
KPLC	Kenya Power and Lighting Company
KSA	knowledge, skills and ability
M&E	monitoring and evaluation
MGI	The McKinsey Global Institute
P&U	power and utilities
ROE	return on equity
SHRM	Society for Human Resources Management
STAR	Situation, Task, Action, Result
STEM	science, technology, engineering, and mathematics
USAID	U. S. Agency for International Development
VPPPA	Voluntary Protection Programs Participants' Association
WEF	World Economic Forum

EXECUTIVE SUMMARY

Women represent half of the world's employment potential; effectively developing this talent is a key part of ensuring organizational competitiveness in the future. In addition, a growing body of evidence demonstrates a correlation between diversity at the executive level with a company's performance. A recent study by McKinsey¹ analyzed more than 1,000 companies in 12 countries and concluded that gender-diverse companies are more likely to outperform their national industry average in terms of profitability.

Despite the evidence demonstrating women's value in the workforce, women continue to encounter structural barriers to participating in the world economy, particularly in industries traditionally dominated by men. Globally, the labor force participation rate for women is 26.7 percent lower than the rate for men. On average, women work fewer hours for pay or profit either because they opt to work part-time or because part-time work is the only option available to them. In some countries, gender gaps in hourly wage rates for similar work can reach 40 percent.²

The U.S. Agency for International Development (USAID) is committed to both promoting gender equality and women's empowerment and strengthening the energy sector in order to fuel economic growth and social development. Through its Engendering Utilities program, and in line with global best practices, USAID identified the human resources (HR) employee life cycle as a key entry point to effecting long-lasting and impactful change within partner utilities. From hiring and recruitment, to retirement and succession planning, HR interventions represent significant opportunities to promote gender equity within utilities. To serve as a guide for increasing gender equity throughout the HR life cycle, USAID developed this Best Practices Framework.

This framework provides utilities with global best practices and practical resources to identify gaps, define objectives and establish a road map for sustained progress in integrating gender equity throughout their operations and corporate structures. As illustrated in Figure 1, the framework is divided into seven HR categories of the HR life cycle: (1) attracting and hiring, (2) compliance and reporting, (3) payroll and administration, (4) employee development, (5) financial benefits, (6) risk management and (7) separation and retirement. A special section focusing on key HR policies was also incorporated into the framework.

Within each HR category, multiple best practices are outlined that are derived from an extensive literature review of global resources and complemented by lessons learned from USAID's Engendering Utilities program. A description is provided for each best practice, as well as potential implementation challenges; examples of successful implementation; and tools, resources and templates that provide additional information on each best practice.

1 McKinsey. (2018). Still looking for room at the top: Ten years of research on women in the workplace, McKinsey Quarterly, March 2018.

2 ILO. (2017). World Employment and Social Outlook: Trends for women 2017, International Labour Office–Geneva.

Figure I. Sample from the Best Practices Framework

TABLE I. ATTRACTING/HIRING BEST PRACTICES				
Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Attraction: Conduct outreach to educational institutions that leads to long-term attraction of both male and female job candidates	Identify schools that have the potential to generate future employees such as technical schools, universities and higher-education institutions Develop outreach program with administration and faculty	Technical schools have low numbers of women as students Universities may also have fewer women in appropriate courses of study	Company increases awareness among the next generation workforce of potential jobs available upon graduation and what course of study is needed for graduates to get those jobs	Women in Energy Work Inclusive Sourcing Wise: A Campaign to Promote Women in Science, Technology and Engineering Why Don't European Girls Like Science or Technology?

The target audience for this framework includes decision makers in utilities, including HR and operations professionals, as well as development practitioners, gender experts and technical advisors throughout the energy sector. This framework can be used as a standalone guide for organizations looking to enhance gender equity by identifying gaps in their current practices and taking concrete steps toward implementing sustainable change.

It is important to note that due to the diversity of companies, cultures, national and local labor laws and trade unions, the framework addresses issues related to both equity and equality. These efforts are jointly referred to as “gender equity” to ensure consistency; however, both equity and equality practices are included in this framework. Definitions for equality and equity can be found in the glossary in Annex II.

WHY GENDER EQUITY MATTERS

There is a growing body of evidence establishing a correlation between increased representation of women in corporate leadership roles and stronger business outcomes for companies. Increasing gender equity and opportunities for women in the economy not only establish a foundation for increasing prosperity and economic growth around the world, but also lead to increased gender equality and women's empowerment.

The World Economic Forum's Global Gender Gap Report³ found that, in absolute terms, earned incomes of both men and women have been increasing. However, this upward trend has been steeper for men than for women, suggesting that the growth in prosperity is not equitably distributed between genders.

Several research studies have found that by not addressing gender gaps in economic participation and employment, economic growth can be stymied. In September of 2015, the McKinsey Global Institute (MGI) estimated the economic losses of not achieving parity by 2025.⁴ MGI reported that a "best in region" scenario, in which all countries match the rate of improvement of the fastest-improving country in their region, could add as much as \$12 trillion, or 11 percent, in annual gross domestic product (GDP) by 2025. In a "full potential" scenario, where women play an identical role in labor markets to that of men, as much as \$28 trillion, or 26 percent, could be added to global annual GDP by 2025.

The World Economic Forum (WEF) showed that in recent years we have actually moved backward in our quest for gender equality.⁵ The WEF attributed this reversal to a global labor force participation rate for women of 54 percent, compared to 81 percent for men; a significant gap in pay between women and men; a persistently small number of women in senior leadership positions; and insufficient hiring, promotion and retention rates to reach gender equality by 2025.

Additional research has examined the business case for gender equity, including the Peterson Institute's global survey of 21,980 firms from 91 countries,⁶ which suggested that the presence of women in corporate leadership positions may improve a firm's performance. Although it is a significant finding, the article notes the statistical results are the product of a single snapshot and should be interpreted cautiously. In a study of Fortune 500 companies, Catalyst found that firms with higher gender diversity in management had 35 percent better return on equity than firms with poor gender equity.⁷ These studies are part of a mounting body of evidence that show gender balance in management and leadership matters.

3 World Economic Forum. (2017). The Global Gender Gap Report.

4 McKinsey Global Institute. (2015). The power of parity: How advancing women's equality can add \$12 trillion to global growth.

5 Mercer LLC and EDGE. (2017). When women thrive: Turning disruption into opportunity for women. Presentation at World Economic Forum's Annual Meeting and Mercer. Available at <https://www.mercer.com/our-thinking/when-women-thrive-turning-disruption-into-opportunity-for-women.html>.

6 Noland, M., Moran, T., & Kotschwar, B. (2016). Is gender diversity profitable? Evidence from a global survey. Available at <https://piie.com/publications/working-papers/gender-diversity-profitable-evidence-global-survey>.

7 Catalyst. (2004). The Bottom Line: Connecting Corporate Performance and Gender Diversity. Available at https://www.catalyst.org/system/files/The_Bottom_Line_Connecting_Corporate_Performance_and_Gender_Diversity.pdf.

ADDRESSING GENDER EQUITY AND WOMEN'S LEADERSHIP IN THE POWER SECTOR

Women face structural barriers to participation in the power sector, including underrepresentation and exclusion from employment, especially in technical, higher-paying positions and leadership roles. The lack of sex-disaggregated data and research on women's roles in sector employment exacerbate inequalities by limiting understanding of where women are currently working in the sector, where gaps exist, and which interventions are most effective for addressing these gaps.

Beginning in 2014, the Ernst and Young Women in Power and Utilities (P&U) Index (2016)⁸ analyzed the boards and leadership teams of the top 200 utilities, by revenue, in the world. The 2016 report notes that the top 20 most gender-diverse utilities significantly outperformed the bottom 20 in terms of return on equity (ROE), with a 1.07 percent difference in ROE between the two groups. Given that utilities are asset-heavy, this difference in ROE is significant, as it could result in millions of dollars of lost profit. The fact that similar conclusions have been reached in two different years with two different data sets (the Ernst and Young 2015⁹ index showed a 1.5 percent difference between the two groups) further demonstrates the connection between gender diversity in leadership and better business performance.

Ernst and Young also found that the number of women on P&U boards and leadership teams is increasing, but progress is slow. The trend in the Ernst and Young 2016 index showed a reduction in both non-executive directors and total board members. At the current rate of a 1 percent rise every three years, it would take as long as 42 years to reach a 30 percent rate of women on boards, and 72 years to reach 40 percent.

ABOUT ENGENDERING UTILITIES

Launched in 2015 by USAID, the Engendering Utilities Program aims to increase gender equity within participating electric utilities and to better understand interventions that effectively increase the role of women in male-dominated sectors. In the pilot phase, Engendering Utilities worked with seven electric distribution companies in five countries: (1) Georgia, (2) Jordan, (3) Kenya, (4) Macedonia and (5) Nigeria. The program identifies global best practices and designs, implements interventions and builds the evidence base through monitoring and evaluation (M&E).

The program began with a study—the first of its kind—to examine the role of women and gender disparities within electric power distribution companies. The data showed wide variation in employment practices and outcomes and suggested that women were excluded from the majority of jobs within these companies. The findings illustrated inequalities in employment outcomes and disparities in the way utilities run their businesses, both of which ultimately impact women's ability to fully participate in the energy sector.

To address these research findings, Engendering Utilities worked with participating utilities to collaboratively design tailored interventions that would improve gender outcomes within their

⁸ Ernst and Young. (2016). Women in Power and Utilities Index 2016. Available at [http://www.ey.com/Publication/vwLUAssets/ey-talent-at-the-table-women-in-power-and-utilities-index-2016/\\$FILE/ey-talent-at-the-table-women-in-power-and-utilities-index-2016.pdf](http://www.ey.com/Publication/vwLUAssets/ey-talent-at-the-table-women-in-power-and-utilities-index-2016/$FILE/ey-talent-at-the-table-women-in-power-and-utilities-index-2016.pdf)

⁹ Ernst and Young. (2015). Women in Power and Utilities Index 2015. Available at [https://www.ey.com/Publication/vwLUAssets/EY-women-in-power-and-utilities-index-2015/\\$FILE/EY-women-in-power-and-utilities-index-2015.pdf](https://www.ey.com/Publication/vwLUAssets/EY-women-in-power-and-utilities-index-2015/$FILE/EY-women-in-power-and-utilities-index-2015.pdf)

organizations. As a result, all seven utilities saw an increase in the number of female employees. Most utilities also saw an increase in the number of women participating in employee training programs, and some saw an increase in the number of women trainees hired, the number of women interviewed and the number of women participating in internship programs. Additionally, Engendering Utilities includes the Gender Equity Executive Leadership Program (GEELP), a graduate-level executive leadership program for partner utilities implemented by Georgetown University's McDonough School of Business.

The course builds the capacity of key HR administrators, operational area managers and other key decision makers in the partner utilities to effectively integrate gender equity initiatives within their corporate structure. This framework served as the foundation for the curriculum taught in the GEELP and served as the guide for the expert HR coaching that each utility received as part of the technical support provided during its participation in the program.

WHY WAS THIS FRAMEWORK CREATED?

USAID commissioned the development of this framework to provide a user-friendly resource that outlines evidence-based best practices that can be applied to increase gender equity in utilities. Utilities can use this framework to identify gender gaps, set gender equity goals and priorities, benchmark their progress and establish longer term plans for sustained progress on gender equity.

Additionally, by providing an overview of the business case for gender equity and outlining concrete steps that can be taken to achieve gender equality, this framework can be used to raise awareness among key utility decision makers about the importance of gender equity. Utility leadership must set gender equity as a corporate goal, because managers and staff need to commit the time, strategic planning and resources to change the organizational culture in order to achieve gender equality. Senior leadership and HR managers can use this framework to design, implement and evaluate gender equity interventions and shift the corporate culture to include shared values and beliefs that include gender equality.

METHODOLOGY

The methodology to develop this framework (Figure 2) included the selection and adaptation of the HR life cycle, a literature review, the selection of best practices and the implementation of a selection of those best practices with the Engendering Utilities partners.

Figure 2. Methodology for the Development of Best Practices Framework



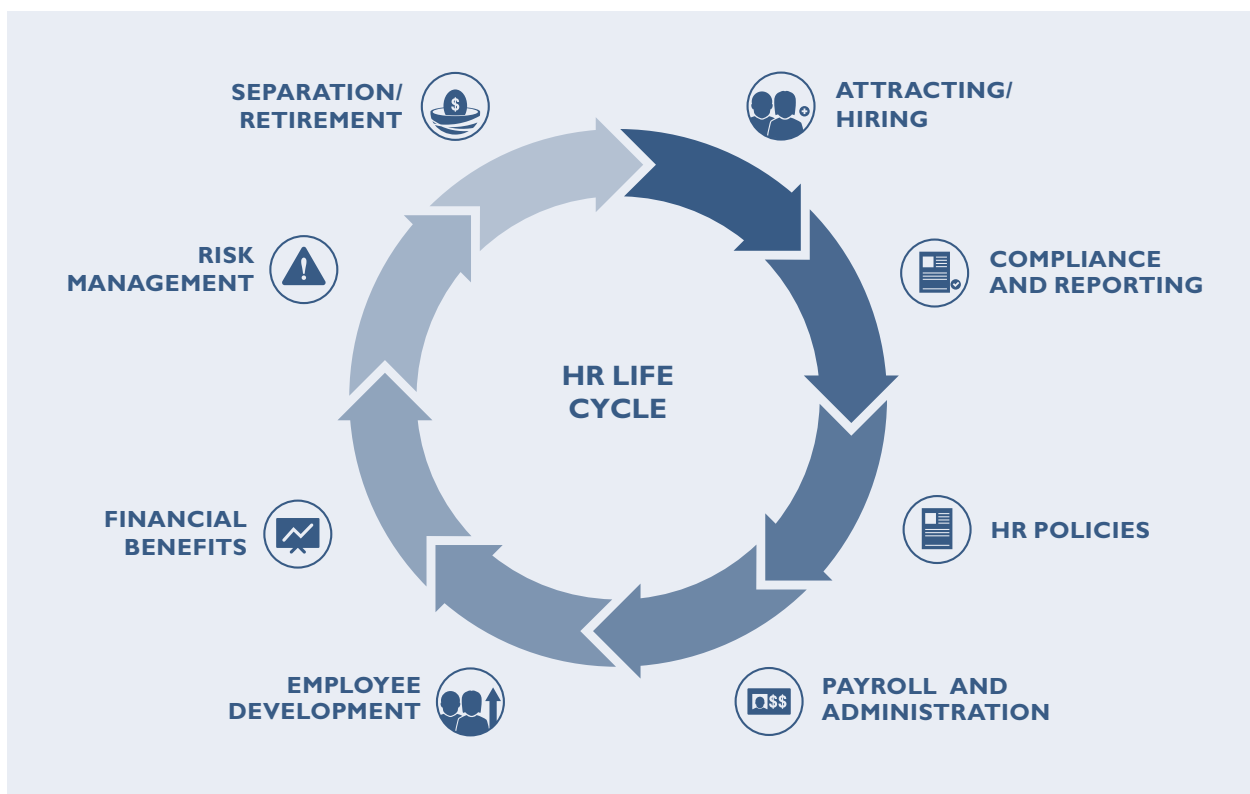


1. SELECT AND ADAPT THE HR LIFE CYCLE

The HR life cycle is a model that describes the stages of an employee's time in a company and the diverse roles the HR function plays in each of those stages. There are numerous versions of the HR life cycle used globally, and not all of them are fully applicable to power sector utilities. For example, some HR life cycle models focus only on hiring. This is a limitation for utilities that often require specific recruitment strategies to build a pipeline of future applicants interested in the energy sector workforce. Selecting, adapting and defining an HR life cycle that closely aligns with the core HR processes of utilities was a critical first step in developing this framework.

Figure 3 summarizes Engendering Utility objectives and capabilities for each HR life cycle state.

Figure 3. HR Life Cycle



2. CONDUCT LITERATURE REVIEW

To select and analyze the most relevant research, criteria was set to narrow the scope of the literature review. These parameters narrowed the review to evidence most directly applicable to increasing gender equity across the HR life cycle in the power sector. These criteria included research and resources that

- were open source;
- included tested and proven practices from reputable sources;

- measured impact using data collected from objective sources; and
- aligned with global best practice and principles.

More than 90 open-source publications were reviewed to identify key gender issues within each stage of the HR life cycle. Keywords utilized included “women’s empowerment,” “gender equity,” “gender equality” and “gender mainstreaming.” The research team prioritized publications that aligned with the guiding principles and omitted documents that suggested best practices that required changing legislation or legal frameworks. The research team included sources from a variety of countries and regions to account for the variability in global labor laws, regulatory constraints, organizational practices and cultural context. An extensive bibliography is included in Annex I. Additionally, findings from management consulting firms—including McKinsey, Bloomberg, and Ernst and Young—were reviewed along with publications recommended by the resident HR expert and the Georgetown University McDonough School of Business team.



3. SELECT BEST PRACTICES

It is universally recognized that recruiting, hiring, developing, motivating and retaining qualified employees is a critical part of a successful business strategy. Therefore, this methodology focused on identifying evidence-based best practices for increasing gender equity into each of these recognized steps. Addressing gender equity in HR policies and practices can widen the qualified candidate pool, increase employee retention and satisfaction and ultimately increase business efficiency and productivity while increasing economic opportunities for women. This can be done through the following two types of HR interventions:

- **HR policies:** A system of codified decisions established by an organization to drive administrative personnel functions, salary and benefits, performance management, employee relations and resource planning. The term refers only to the legal documents produced by HR, accepted by the company and disseminated to employees. HR policies are deliberately focused, as they constitute what the company is legally evaluated by in the event of employee grievances.
- **HR practices:** HR policies are put into action by daily practices that give HR the ability to adopt, implement and operationalize policies. Practices are more adaptable than policies and can be adapted more quickly to meet evolving organizational needs.

To curate the best practices featured in this guide and include the most applicable recommendations for power sector utilities in the developing world, the selection of best practices follows these guiding principles:

- Consider the in-country regulatory environment and laws when analyzing regional/country variables, planning training and providing technical assistance;
- Foster diverse cultural and gender environments with special emphasis on developing country scenarios and experiences; and
- Align with global best practices in addressing gender equity issues in the workforce broadly.

There are many gender issues to consider throughout the HR life cycle; however, this framework aims to address the most critical and relevant gender issues for power sector utilities. Specifically, it focuses on those issues that limit women's participation, employment and leadership within utilities in the developing world. The gender gaps identified in the initial Engendering Utilities baseline study served as the starting point for identifying evidence-based interventions. Building on those initially identified gaps, the literature review revealed additional challenges and accompanying best practices that were then integrated into the framework.



4. IMPLEMENT BEST PRACTICES

Faculty from Georgetown University's McDonough School of Business and the Engendering Utilities expert HR coach developed the curriculum for the GEELP based on the selected best practices. During the GEELP pilot stage, partner utility HR and operations staff learned firsthand how to apply the HR best practices in their companies. The utility staff conducted gender gap analyses to identify key gender equity gaps in their own institutions, identify which best practices were most relevant and applicable, design interventions to implement selected best practices and utilize change management techniques to garner high-level approval to begin implementing their recommendations. In addition to the GEELP, participants received tailored coaching to help apply the best practices in real life working conditions and scenarios.



5. MONITOR, EVALUATE AND LEARN

An M&E system was created to complement the pilot implementation of the framework to facilitate learning and adaptation. M&E activities captured both qualitative and quantitative information on the effectiveness of the approaches, strategies and activities designed and implemented by the utilities during their participation in Engendering Utilities. Additionally, M&E activities gathered information to build, test and validate the framework by confirming that the best practices were appropriate and effective for application in power sector utilities.

Quantitative data for a set of standardized program indicators was collected and analyzed using data reported quarterly by participating utilities, staff from Georgetown University's McDonough School of Business and the expert HR coach. Quarterly qualitative reports supplemented quantitative information with case studies, success stories and firsthand perspectives on program activities and results. Two types of evaluations examining participant experiences were utilized: (1) one for each module of the GEELP; and (2) a follow-up survey to evaluate the program as a whole and how course participants implemented what they learned. Finally, supplemental qualitative interviews were conducted with the utility employees participating in the program, as well as with other beneficiaries and decision makers from the utilities.

ENGENDERING UTILITIES BEST PRACTICES FRAMEWORK

HOW TO USE THIS FRAMEWORK

The framework is divided into seven sections, one for each stage of the HR life cycle. Each section includes a description of the HR life cycle stage in general terms and a list of evidence-based best practices that can be implemented to address gender equity. Each best practice is accompanied by the following:

- A description of the gender issues that are addressed by the best practice;
- Common implementation barriers;
- Definitions of success; and
- Links to resources and tools to help implement each best practice.

There will likely be common challenges that arise for utilities implementing these best practices. Strategies to overcome these challenges should be developed upfront to avoid common pitfalls to successful implementation. Common challenges include the following:

- Lack of senior leadership buy in;
- Lack of committed resources;
- Limited understanding of change management processes within the organization;
- Perceptions that utilities are places for only men to work;
- Existence of systemic unconscious bias;
- Suppression of acknowledgement and/or reporting of gender-based violence (GBV) issues;
- Lack of female students studying relevant technical areas in schools;
- Lack of workplace indicators disaggregated by sex and utilization of disaggregated data in decision making; and
- Failure to articulate the benefits of gender equity to workers and to engage unions.

Organizations using this framework should select the most appropriate best practices to address their organizational needs and use the tools associated with each best practice to guide their implementation. As a practical first step, organizations are encouraged to conduct a gender gap analysis, as defined in the glossary (Appendix II), to best understand where the most egregious gender gaps exist and to focus on implementing interventions that address the highest priority areas. Conducting additional analysis, such as a salary gap analysis, will also strengthen the organization's ability to select and adapt the most relevant and impactful interventions for their company's specific context. It is also highly recommended that organizations work with HR and/or gender specialists to assist in the selection, design, implementation, and M&E of the best practices.

BEST PRACTICES

These best practices were compiled, assessed, selected and adapted from a comprehensive literature review of more than 90 sources and the pilot phase of USAID’s Engendering Utilities. It is important to note that not all of these best practices may be applicable in all countries. Factors such as national and local labor laws and a company’s internal policies should be taken into consideration when implementing this framework.

Readers should note that the resources provided in the following tables are links to live websites. As organizations update their websites, original resources and URLs may not be available or may change over time. Static versions of all original resources in this guide are available on [this Google drive](#). As many resources and organizations evolve over time, these websites will also provide additional and new information and resources that you may find helpful.





ATTRACTING/HIRING

Systematic process for developing job descriptions, generating a pool of candidates and selecting and onboarding the right candidate.

TABLE I. ATTRACTING/HIRING BEST PRACTICES

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Attraction: Conduct outreach to educational institutions that leads to long-term attraction of both male and female job candidates	Identify schools that have the potential to generate future employees such as technical schools, universities and higher-education institutions Develop outreach program with administration and faculty using messages that: <ul style="list-style-type: none"> • State the company's equal opportunity statement • State the desire to encourage women to study science, technology, engineering and mathematics (STEM) subjects to qualify them for potential employment • Develop cooperation with the school for a student outreach program • If needed, work with the school to reach out to parents or to feeder schools to encourage girls to pursue careers in the STEM field In collaboration with the school, develop and implement a student outreach program. The program can include messaging that: <ul style="list-style-type: none"> • Informs students that the company is an equal opportunity employer with a wide variety of careers 	Technical schools have low numbers of women as students Universities may also have fewer women in appropriate courses of study School leadership may not have demonstrated interest in targeting gender biases Inherent perception that utilities are places for only men to work Utilities may be seen as old-fashioned businesses and have less appeal to young people, particularly women Inherent perception that utility work is only field work or customer service and is therefore unappealing Utilities may have extremely limited resources in terms of time and money to implement new outreach programs and data tracking systems	Company increases awareness among the next generation workforce of potential jobs available upon graduation and what course of study is needed for graduates to get those jobs Girls are encouraged to pursue STEM studies and are also aware that women are welcome in technical areas Company positions itself within the community as an attractive employer for women and men Over the long term, the number of women students applying for internships and/or jobs increases	Women in Energy Work Inclusive Sourcing Wise: A Campaign to Promote Women in Science, Technology and Engineering Why Don't European Girls Like Science or Technology?

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
	<ul style="list-style-type: none"> • Showcases female role models, thereby encouraging female students to pursue STEM studies <p>Develop and implement a data tracking system to determine if more students from the targeted schools apply for internships and/or jobs</p> <ul style="list-style-type: none"> • Disaggregate the data by sex to determine if more women students apply for internships and/or jobs 			
Recruitment and selection: Conduct candidate recruitment and selection that leads to an increased number of qualified women applying for and obtaining positions	<p>Base job descriptions and resulting job postings on validated job competencies</p> <p>Reduce potential bias by focusing on the job description only and on what must be done and known (i.e., reduce superfluous information by using validated competencies that could lead to bias and focus on critical areas of expertise)</p> <p>Use descriptive words in job advertisements that include both men and women as well as the company's equal employment opportunity (EEO statement)</p> <p>Post job advertisements in a variety of media so that both men and women are equally likely to view the job posting</p> <p>Design selection processes to reduce bias through behavior-based interviewing and diverse panels of interviewers</p>	<p>Validating competency-based job descriptions is time consuming</p> <p>Local languages may present a challenge for clearly wording job postings, particularly when different words are used for masculine and feminine nouns, such as "engineer"</p> <p>Gender neutral and/or gender-inclusive language may be viewed as an unimportant detail</p> <p>Managers may resist relinquishing their hiring power to a panel</p> <p>Behavior-based interviewing can be time consuming (depending on how efficient your hiring processes are) and requires a cultural shift</p>	<p>Companies adopt gender equitable language and base job descriptions on validated competencies</p> <p>Recruitment success is measured by increased gender equity in the pool of applicants</p> <p>Companies adopt behavior-based interview techniques</p> <p>Recruitment and selection success are measured by an increased number of female employees</p> <p>Interview panels have at least one suitable representative of each gender</p>	<p>Overview of HR Competency Models</p> <p>Hiring Managers Behavioral Interview Guide</p> <p>Nova Scotia's Guide to Gender-Diversity in Employment</p> <p>Tips for Gender Sensitive Interviewing</p>

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
<p>Analyze and revise existing internship program(s) to set balanced participation from males and females as an expectation</p> <p>If new internship program(s) are developed, design the program with gender-inclusive processes</p>	<p>Ensure internship outreach communication to administration and faculty:</p> <ul style="list-style-type: none"> • State the company's equal opportunity policy • Encourage women to apply for internships • Include gender messaging in outreach to parents via the school <p>Develop and implement data tracking to determine if more students from the targeted schools are hired for internship and/or jobs:</p> <ul style="list-style-type: none"> • Disaggregate the data by sex to determine if more women students are hired for internships • Conduct long-term tracking to determine if more women interns apply for jobs <p>Conduct intern orientation that:</p> <ul style="list-style-type: none"> • Encourages interns to pursue a career within the utility • Includes women role models from a variety of positions • Shares the company's message of inclusive employment <p>Include in internship programs:</p> <ul style="list-style-type: none"> • Intern supervisors who are trained to be aware of and eliminate gender bias in their supervision • Intern supervisors who create a positive environment for both male and female interns • Field and office-based internships that are equally accessible to men and women 	<p>Schools may not have sufficient numbers of students who are girls and/or women to ensure equitable participation</p> <p>Schools may not have demonstrated interest in addressing gender biases</p> <p>Internship announcements may not reach full pool of qualified candidates</p> <p>Families and faculty may not equitably encourage men and women to apply for certain internships</p> <p>Intern placement in field and office roles may be gender biased</p>	<p>Women from targeted educational institutions apply for internships in higher numbers</p> <p>Increased number of women accepted for internships in a wider variety of placements</p> <p>Increased number of female job applicants from internship pool</p> <p>Training for internship supervisors is expanded to include gender-equity and non-discriminatory practices</p>	<p>Starting and Maintaining a Quality Internship Program</p> <p>Employer Guide to Structuring a Successful Internship Program</p> <p>Energy Sector Internship Program</p>

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Assess and revise internal and external communication to contain gender neutral and/or gender equitable language and photos	<p>Ensure internal and external corporate communications contain the EEO statement</p> <p>Use gender-inclusive language in all communication and equitably distribute photos of women and men among pictured work environments</p> <p>Ensure customer depictions accurately show the full range of customer diversity</p>	<p>Word and photo communication choices may be viewed as trivial</p> <p>Resources to create new communication material may be limited</p>	Internal and external communications feature men and women in a range of positions	<p>Sample EEO Policy</p> <p>U.S. Department of Labor EEO</p> <p>A Guide to Gender Equality in Communications</p> <p>Gender and Communications Toolkit</p> <p>Guidelines for Gender Sensitive Language</p>



COMPLIANCE AND REPORTING

Compliance: Documentation of what is expected for employees, as individuals and as group representatives, in line with applicable federal and other relevant laws, rules and regulations. **Reporting:** Relevant and timely HR information that supports the operational requirements of departments.

TABLE II. COMPLIANCE AND REPORTING BEST PRACTICES

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Establish a corporate-level commitment to gender equity	<p>Adopt an EEO policy statement at the board of directors/ownership level</p> <p>Disclose board selection process, skills and diversity goals</p> <p>Appoint HR and dedicate financial resources necessary to implement EEO policy and other company programs aimed at promoting gender equity</p> <p>Model inclusive language and commitment to gender from the top of the company</p> <p>Establish a multidivisional gender committee to plan, oversee and support the implementation on gender equity initiatives</p>	<p>Stakeholders lack commitment during EEO policy formulation and adoption</p> <p>Unconscious bias exists within the company</p>	<p>EEO policy is adopted and fully implemented through supporting processes, as detailed in this framework</p> <p>Training programs raise awareness of unconscious bias and build commitment to implementing policies and procedures that ensure gender equality</p> <p>Gender equality is an ingrained part of corporate culture</p>	<p>Establishing the Business Case for Women</p> <p>Diversity and Performance</p> <p>CEO Statement of Support</p> <p>Developing a Workplace Equality Policy</p> <p>Sample Equality Strategy and Action Plan</p>
Support efforts by the government and the community to leverage women's economic empowerment opportunities within their own supply chains	<p>Participate in governmental forums and community initiatives promoting women's economic empowerment</p> <p>Analyze supply chain and implement equal opportunity processes allowable within legal requirements and community standards</p>	<p>Governmental forums and community-based groups may not be in alignment regarding purpose and outcomes</p>	<p>The company examines its own supply chain and implements legal gender-equitable purchasing practices</p> <p>Company policy states that contractors and subcontractors meet gender-equity standards and will be vetted during selection</p>	<p>Building Effective Women Empowerment Strategies</p> <p>Sample Women-Owned Procurement Program</p>

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Collect sex-disaggregated data at the company level and use the data to regularly monitor progress for gender equity interventions	Ensure reporting systems have statistical ability to sex-disaggregate employee-satisfaction data, training hours, positions in company, use of leave and pay disparities (pay gap)	Companies are at varying levels of sophistication with their HR analytics, which may inhibit their ability to sex-disaggregate and use data	Sex-disaggregated data meet industry standards and are routinely collected and maintained	Guidance on Data Disaggregation International Gender Reporting Schemes Why It Is Important to Sex Disaggregate Data
Include the proportion of women employees overall, including senior executives and board members, in annual reporting	Ensure HR has capacity to analyze and use sex-disaggregated data Regularly use data to analyze successes and areas for improvement	Correcting pay gaps impacts finances, and there may not be funding to correct the gap Changes that impact union contracts may take several years to implement	Sex-disaggregated data are continuously available and used to make decisions Identified gaps are closed Company has tailored and disaggregated data using its HR Information System (HRIS) when available	Gender Tracking and Reporting: Engendering Utilities Tracker Guidelines for Gender Balance Performance and Reporting
Report on gender objectives and performances toward objectives in annual reports	Regularly share data with upper management to inform decision making regarding allocation of resources and commitment to initiatives			When a company has an HRIS, the software can disaggregate data multiple ways
Disaggregate employee satisfaction survey by sex	Design and administer survey according to global best practices (i.e., validated surveys are disaggregated by sex) are disaggregated by sex Design survey to ask questions related to better understanding issues related to gender, such as: • My CEO prioritizes gender diversity • Commitment to gender diversity is important, because it contributes to a positive image of the company • Promotions at this company are based on fair and objective criteria Analyze data from the survey Use satisfaction data to develop an action plan to close gaps	Multiple modalities (e.g., phone, computer, paper) may be needed to reach all employees Union employees may be required to complete the survey on company time and phone-based surveys may be prohibited If surveys are outsourced, the survey company may increase the cost for the additional service of disaggregating data Invalid surveys (surveys that are not well designed) could result in inaccurate results or gender bias	Employee satisfaction surveys are conducted periodically, and data are disaggregated by sex Data are used to inform decisions furthering gender equity	Instructions for Employee Opinion Survey Women in the Workplace Beginners Guide to Employee Engagement Surveys

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Establish health and safety standards that explicitly and equally consider the needs of men and women	<p>Adopt safety policies addressing the needs of men and women and the processes for implementing them</p> <p>Include health and safety protocols in job duties and responsibilities</p> <p>Provide women equal access to personal protective equipment (helmet, etc.)</p> <p>Provide equal access to facilities to men and women, such as restrooms and changing rooms</p> <p>Ensure women have equal access to field safety training and benefit equally from field safety protocols (i.e., liveline protocols, tag-out procedures)</p>	<p>Company may have to change purchasing protocols to ensure a wider range of equipment sizes</p> <p>Cost of installing facilities and purchasing additional gear could be unrealistic for company</p> <p>Company may not have developed a complete set of safety protocols or may not be properly enforcing existing protocols, putting both male and female workers in danger</p>	<p>Company adopts health and safety policies and practices that equitably protect men and women</p> <p>Men and women have the same access to safety equipment, facilities and training</p>	<p>Functional HR policies and work environment policies (<i>Contact HR within the company</i>)</p> <p>Bridge the Gap Between Sex, Gender and Workplace Health and Safety</p> <p>Workplace Policies Fact Sheets</p> <p>The Voluntary Protection Programs Participants' Association, Inc.*</p> <p><i>*Requires membership to access resources</i></p>



HR POLICIES

The agreements organizations have with employees about expected mutual behavior. Policies must align with laws and contracts, such as union agreements.

TABLE III. HR POLICIES

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Adopt a salary equity policy with mechanisms for analysis and redress	<p>Ensure salary equity policy explicitly addresses the following areas:</p> <ul style="list-style-type: none"> Salary discrimination within a job category: for example, “Engineer I”: A male and a female both with master’s degrees in engineering and five years’ experience being paid differently Salary discrimination between job categories; for example, having two job titles, “Office Manager” and “Field Office Manager,” with the same responsibilities, but “Office Manager” is paid less and held mostly by women In the hiring and promotions processes, do not ask or use prior salary to determine current salary 	<p>Funds may not be available to close identified pay gaps</p> <p>Union contracts may require amendment during upcoming contract negotiation cycle</p> <p>There is a perception of bias by groups whose salary is unchanged</p> <p>Potential legal action is taken by the group previously paid less</p>	<p>Company adopts and enforces salary equity</p> <p>Company closes salary gaps in both areas</p> <p>Men and women are paid equitably</p>	<p>Understanding and Achieving Equal Pay</p> <p>Equal Pay for Equal Work</p> <p>Equal Pay International Coalition</p> <p>Closing the Gender Pay Gap</p>
Adopt a sexual harassment and workplace violence policy	<p>Include the following key elements of sexual harassment and GBV policies:</p> <ul style="list-style-type: none"> Definition and examples of prohibited behaviors Description of reporting procedure that includes multiple reporting channels 	<p>Country culture may suppress acknowledgement and/or reporting of GBV issues</p> <p>Country culture may accept sexual harassment as normal behavior</p> <p>Employees may choose not to report for fear of retaliation</p>	<p>Policies are published throughout the organization in multiple languages</p> <p>Staff at all levels are trained on an annual basis on harassment and GBV policies and procedures</p>	<p>Model Workplace Policy for Domestic and Sexual Violence</p>

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
	<ul style="list-style-type: none"> • Description of individuals' responsibilities (e.g., employees, managers, supervisors and HR) in upholding/enforcing the policy • Description of investigation process • Description of confidentiality expectations • Prohibition of and punishment of retaliation • Description of appropriate discipline for employee found to be in violation 	Reported abuses may not be taken seriously by management even if well-established harassment and GBV policies and processes are in place	<p>Staff are trained on and practice respectful and civil language and behavior; this behavior is given positive reinforcement</p> <p>Staff are comfortable using reporting and resolution processes</p> <p>Safe and respectful workplace is created and maintained</p>	
Establish family leave policies meeting the stated needs of parents and employees caring for sick family members	<p>Meet in-country legal requirements for leave</p> <p>Implement additional leave to close the gap identified by the company's benefits analysis</p> <p>Communicate these benefits to all employees</p> <p>Train supervisors and managers about their role in creating a supportive climate in which employees feel comfortable using leave</p> <p>Encourage company leadership to take appropriate leave in order to encourage employees to do the same</p> <p>Create and implement processes to maintain full staffing while employees are on leave</p>	<p>Country culture may discourage fathers from taking paternity leave</p> <p>Company culture may discourage both women and men from taking full parental or family leave</p> <p>Bias may discourage supervisors and managers from hiring women because they suspect the woman will leave the workplace</p> <p>Business unit is short staffed and remaining employees must pick up extra duties</p> <p>Company funds may not be available to pay for the additional leave</p>	<p>Both fathers and mothers use available leave</p> <p>Men and women use available leave for care of family</p> <p>Business units are supported through such programs as job sharing, hiring temporary workers and cross-training so as to maintain full staffing while employees take leave</p>	<p>Flexible Work Day/Hours</p> <p>Maternity Parental Leave Schemes</p>

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Establish return to work policies, providing a transition back to full time work for parents returning from leave	<p>Implement options that are legal and aligned with local culture. Among global best practices are:</p> <ul style="list-style-type: none"> • Telework for part of the work week • Flexible work schedule • Shorter workday for returning parents • Longer lunch break for baby feeding • Clean, comfortable, private and safe lactation room <p>Create and implement processes to maintain full staffing while reintegrating the returning employee</p>	<p>Local work law may prohibit some options</p> <p>Individual work units may have set hours within which flexible hours create staffing difficulties</p> <p>Field offices may not have the physical space to provide a lactation room</p> <p>Telework requires reliable internet, which is not always available</p> <p>Some positions are staffed 24/7 and/or are on call for emergencies. Flexible work hours may be difficult to accommodate</p>	<p>Mothers feel comfortable and make use of lactation rooms</p> <p>Parents use options to create work/life balance</p> <p>Employees report in satisfaction or engagement surveys that they perceive leave policies as fair to all employees</p>	<p>Guidance for Returning to Work after Parental Leave</p>
Establish child care facilities or provide monetary assistance with child care arrangements	<p>Conduct an analysis to determine what assistance best meets employee needs. This data may need to be disaggregated by both sex and region (for companies with multiple offices)</p> <p>Conduct a forecast of financial benefits to determine the option that best meets the needs of all stakeholders</p> <p>Implement the option that best meets the needs of stakeholder groups</p>	<p>The cost of onsite child care facilities, staffing and maintenance costs may not be financially feasible, especially in companies with regional offices as well as headquarters</p> <p>Regional offices may be located in places with few or no child care facilities nearby</p>	<p>Child care facilities, monetary assistance or a combination of the two are adopted</p> <p>Parents use the options provided</p> <p>Care facilities are maintained for safety and comfort</p> <p>Care facility staff are properly trained in child care</p>	<p>Employer Supported Child Care</p> <p>The Business Case for Employee-Supported Child Care</p> <p>Employer-Supported Childcare</p>
Review and revise all HR policies to contain gender-inclusive language and ensure gender equality	<p>Use this framework to analyze current HR policies</p> <p>Identify areas for change; revise and adopt changed policies</p>	<p>Some policy changes may require union review prior to adoption</p>	<p>Policies contain gender-inclusive language and are equitable</p>	<p>2017 Bloomberg Financial Services Gender-Equality Index</p>



PAYROLL AND ADMINISTRATION

A mix of different types of rewards designed to attract, retain and motivate individuals who have the skills and dedication necessary to make a company successful.

TABLE IV. PAYROLL AND ADMINISTRATION BEST PRACTICES

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Conduct salary gap analysis to determine if there are gender differences. Adjust salaries to close any identified gap	<p>Conduct periodic salary analyses to determine gender-based pay gaps:</p> <ul style="list-style-type: none"> Gender-based pay gaps may be within a job category, such as “Junior Engineer” Gender-based pay gaps may also be between job categories, such as “Office Manager” and “Field Office Manager,” when both have the same duties but have different salaries and are dominated by one gender <p>Develop and implement a clear process to remove salary inequities</p>	<p>Some job categories do not currently have enough women to conduct a valid salary analysis</p> <p>Difficulty and time required to correctly assess two different job categories to determine if they are to be valued the same or differently</p> <p>Employee and manager push back regarding salary adjustments for impacted female employees</p>	<p>Company periodically conducts salary data analysis and addresses salary inequities (i.e., adjusts salary of affected person or group)</p> <p>Corporate-level commitment to pay equity is communicated regularly throughout the company</p> <p>HR department and managers are held accountable for salary equity enforcement</p>	<p>Model Agency Pay Equity Audit</p> <p>Conducting Equal Pay Audit</p> <p>Equal Pay</p>
Conduct equity and impact analysis of benefits, including usage/uptake of benefits	<p>Conduct periodic benefit analysis surveys to determine equitable distribution and use of benefits (i.e., men/women could feel pressure not to use maternity/paternity leave due to negative corporate culture)</p> <p>Adjust accordingly if benefits are not being equitably distributed/used</p>	<p>HRIS system may not capture all relevant data categories</p> <p>Country culture may discourage use of some benefits</p>	<p>The company periodically conducts benefits data analysis, disaggregates the data by sex and addresses benefit inequities</p> <p>Through communication, storytelling and leading by example, the company promotes a culture in which employees feel comfortable using their benefits</p>	<p>Employer Toolkits for Administering Benefits</p> <p>Understanding Pregnancy Discrimination</p>



EMPLOYEE DEVELOPMENT SYSTEM

Design and implementation of tools for employers to support identifying skills, knowledge and performance within an organization; the system helps an organization recognize gaps and then introduce appropriate training, compensation and recruiting programs based on current or future needs.

TABLE V. EMPLOYEE DEVELOPMENT SYSTEM BEST PRACTICES

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Ensure professional development and career advancement opportunities meet the needs of, are accessible to and are used by both men and women	<p>Conduct training and development needs analysis to determine:</p> <ul style="list-style-type: none"> • Knowledge, skills and abilities (KSAs) needed by the company • Training and development opportunities to meet the KSAs • If any KSAs must be hired rather than developed <p>Create individual learning plans for all employees aligned with company needs and career goals of the employee in mind</p> <p>Create training and development opportunities to close KSA gaps that are equally accessible to men and women through a variety of methodologies, such as job rotation, conferences, job shadowing, training and mentoring</p>	<p>Development opportunities for employees and access to training may be ad hoc rather than connected to career goals</p> <p>Development initiatives offered may not be fully aligned with corporate strategy</p> <p>Managers may not be fully trained to have development conversations with employees</p>	<p>Development plans for employees are connected to career goals and audited for equity, and any inequities found are corrected</p> <p>A variety of professional development opportunities are designed intentionally to address identified gender equity gaps</p> <p>Training managers present development opportunities in an unbiased manner</p>	<p>A Path to Empowerment</p>
Ensure that a fair and unbiased employee performance management process exists	<p>Analyze ratings given to male and female employees to determine if there is a statistical bias in ratings</p> <p>Determine the root cause of the bias and develop corrective action based on the root cause</p>	<p>HR may not have access to performance reviews, as they are, under some circumstances, confidential between manager and employee</p>	<p>Performance ratings accurately assess KSAs for all employees</p> <p>Managers are fully trained on how to assess and rate performance</p>	<p>4 Unconscious Biases That Distort Performance Reviews</p>

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
	Include gender balance targets as key performance indicators for managers	<p>The performance management system may be prone to systematic bias when ratings impact pay raises. For example, all ratings are at the top of the scale, so all employees receive maximum raise</p> <p>Some organizations may not have a performance management system or managers may ignore it</p>		
Establish and implement succession plans that are inclusive of women	<p>Ensure succession planning is the process of identifying long-range needs and cultivating a supply of internal talent to meet those future needs</p> <p>Use succession plans to anticipate the future needs of the company and assist in finding, assessing and developing human capital that advances the strategy of the company</p> <p>Ensure gender-equitable succession plans include the identification of key positions, gender-neutral selection criteria, a plan for how to develop candidates selected and goals for inclusion at all levels of leadership</p>	<p>Companies may not have succession plans in place</p> <p>Promotion is often seniority-based</p> <p>In some countries performance appraisal is between boss and employee and not shared with HR, so those appraisals cannot be used as part of succession planning</p> <p>There may be an unconscious gender bias regarding who should fill a particular position</p>	<p>Gender-equitable succession plans are written and implemented</p> <p>Increasingly equal representation is achieved in leadership positions (long term)</p>	<p>Business Case for Women in Leadership</p> <p>Fostering Women Leaders</p> <p>Business Succession Planning</p>

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Include diverse employee populations in leadership development	<p>Base development opportunities on leadership KSAs identified as success factors</p> <p>Ensure opportunities include both group learning and individual learning plans to close KSA gaps identified</p> <p>Ensure learning opportunities are fully supported by the company and offered through a variety of modalities, such as online learning, job rotations and classroom learning</p>	<p>Companies may not have competency-based leadership development</p> <p>Unconscious bias may affect training opportunities offered</p> <p>Classroom learning, conferences and job rotations may require travel and time away from home</p>	<p>Companies have planned leadership development and keep records to ensure equitable participation</p> <p>Support is provided for employees who must travel and/or the development is offered through multiple modalities</p> <p>The number of women possessing the KSAs for future leadership positions increases</p>	<p>No Ceiling, No Walls Ted Talk</p> <p>Paperback book: <i>No Ceiling, No Walls: What Women Haven't Been Told About Leadership from Career-Start to the Corporate Boardroom</i>, January 18, 2010, by Susan L. Colantuono</p>
Train key leaders and management to recognize and address bias	<p>Hold training and facilitate discussions to raise awareness of unconscious bias and how to address it</p> <p>Engage leaders in actions to reduce unconscious bias</p> <p>Follow up on action plans and support management with additional help and information when they encounter situations new to them</p>	<p>Senior leaders' schedules are difficult; training may need to be adapted to short time periods</p> <p>Managers may not see the need for training</p>	<p>Senior- to mid-level management participates in training that results in a managerial action plan that is implemented</p> <p>Senior leaders hold all levels of leadership accountable for taking action to reduce bias</p>	<p>Gender Equity Training Resources</p>



FINANCIAL BENEFITS

Any form of payment—such as a pension or medical/dental coverage—that is due to an employee (or employee beneficiary) who is enrolled in a benefit plan. * For more information on nonfinancial benefits, refer to Table III.

TABLE VI. FINANCIAL BENEFITS BEST PRACTICES

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Ensure professional development and career-advancement opportunities meet the needs of, are accessible to and are used by both men and women	<p>Ensure medical benefits cover both men and women employees. When family medical care is offered, ensure that both men and women can enroll family members and that health issues specific to both men and women are covered</p> <p>Offer tuition reimbursement to both men and women</p> <p>Provide equal opportunity to women and men to participate in retirement plans</p> <p>Assess gender disparities in participation and usage of benefits using sex disaggregated data</p>	<p>Culturally, women may not report certain health issues or may be denied treatment</p> <p>Disproportionate unpaid care work responsibilities may impact women's ability to use tuition reimbursement benefits</p>	<p>Sex disaggregated data show that men and women use benefits at similar rates</p> <p>If data show disparate impact, corrective measures are taken</p>	



RISK MANAGEMENT

System for anticipation and mitigation of the uncertainty that arises from an array of workforce and people-management issues. If mishandled, these issues may affect an organization's ability to meet its strategic and operating objectives.

TABLE VII. RISK MANAGEMENT BEST PRACTICES

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Implement a fair and respectful violation reporting, investigation and resolution process that creates an open environment to address complaints	<p>Ensure that key elements of the reporting process can be similar to the sexual harassment reporting process, such as:</p> <ul style="list-style-type: none"> • Definitions and examples of prohibited behaviors • Description of reporting procedure that includes multiple reporting channels • Description of the responsibilities of employees, managers, supervisors and HR • Description of the investigation process • Description of confidentiality expectations • Prohibition of and punishment of retaliation • Description of appropriate discipline for employee found to be in violation 	<p>The global standard is an outsourced reporting process that companies may not be able to afford</p> <p>Employees may perceive that there could be retaliation from an in-company process</p>	Companies fully implement a complaint process that all employees feel comfortable using	EEOC Guidelines for Anti-Harassment and Non-Discrimination Policies and Complaint Procedures
Implement a change management plan to promote equity throughout the company	<p>Develop a written change management plan that includes all HR practices that promote gender equity (i.e., establish business case; lead, influence and implement plan)</p> <p>Assign specific accountabilities to individuals and teams</p> <p>Conduct regular follow up to determine that accountabilities are met. When they are not met, ensure there is a process to solve the issue</p>		<p>Key people identified in the plan take ownership of action items that promote gender equity across the HR life cycle</p> <p>Engendering goals are met</p>	Gender and Organizational Change



SEPARATION/RETIREMENT

Management of the end of an employment relationship, whether the person resigns or retires, or if employment is terminated.

TABLE VIII. SEPARATION/RETIREMENT BEST PRACTICES

Best Practice	Description of Best Practice	Challenges to Implementation	What Success Looks Like	Available Resources and Tools
Address the gender impact of retrenchment	<p>Develop a written plan and data collection method to ensure that retrenchment does not have disparate impact on a particular group or groups</p> <p>Conduct data analysis prior to beginning retrenchment and correct any disparate impact</p>	<p>Culturally/legally, companies may rely on retirement and programs that encourage early retirement, making retrenchment unlikely and limiting the ability to manage separation equity</p> <p>HRIS may not capture all relevant data points (i.e., sex disaggregated data)</p>	The ratios of men and women within job classifications are proportionately retrenched during downsizing	<p>Managing Retrenchment</p> <p>Addressing Gender Impacts in Privatization of Kenya Railways</p> <p>Retrenchment and Restructuring: A Brief Guide</p> <p>Use data on affected groups can be extracted from HRIS and analyzed for fair distribution of impact</p>
Ensure both men and women participate in retirement plan and/or financial education programs	<p>Fund corporate retirement plan to provide income to retirees</p> <p>Support financial education regarding saving for retirement</p> <p>Clearly define employee participation in the plan or education support; share information about how to participate with all employees</p> <p>Periodically audit the plan usage and/or participation in training to determine if there is disparate impact</p> <p>Collect sex-disaggregated participation and usage data to understand potential gender differences</p> <p>If disparate impact is found, determine the root cause and take corrective action is taken</p>	<p>Retirement plans may be governmental rather than corporate and are subject to legal constraints</p> <p>Governments may also set different legal retirement ages for men and women</p> <p>The ability to save and plan for retirement is intrinsically connected to pay equity, promotion and other related HR policies</p>	When a corporate retirement plan exists, men and women participate and benefit from it equally	<p>The Gender Pension Gap</p> <p>Shaping the Future of Long-Term Investing, Infrastructure and Development System</p> <p>World Social Protection Report 2017–2019</p> <p>Use data on affected groups that can be extracted from HRIS system and analyzed for fair distribution of impact</p>

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ANNEX II: GLOSSARY

Behavior-based interviewing

A type of interviewing grounded in the theory that the most accurate predictor of future performance is past performance in a similar situation. With this type of approach, employers predetermine the core competencies or skills required for success in a particular job. When interviewers ask questions, they are probing for behavior patterns. This technique is also known as STAR: Situation, Task, Action, Result.

Best practice

A procedure that has been shown by research and experience to produce optimal results and that is established or proposed as a standard suitable for widespread adoption. (Source: Merriam-Webster, 2018)

Certificate course

See Gender Equity Executive Leadership Program (GEELP).

Community of practice

“Groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly.” This learning that takes place is not necessarily intentional. (Source: Lave and Wenger, 1991)

Conference

A meeting of several people to discuss a particular topic, not to be confused with a convention, colloquium or symposium. While a conference differs from the others in terms of size and purpose, the term can be used to cover the general concept. At a conference, innovative ideas are formulated and new information is exchanged among experts. For Engendering Utilities, the purpose is likely a business conference held for people working in the same company or industry. They come together to discuss new trends and opportunities pertaining to the business.

Core competency

A defined level of proficiency that results from a specific set of skills or techniques that deliver additional value to DISCO customers. Engendering Utilities and the GEELP emphasize the following as core competencies: strategic leadership; gender equity leadership; equitable human resources (HR) policies and practices; change management; understanding and accommodation of the career life cycle of women; and creation of organizational environments that promote inclusion, diversity and growth for all employees.

Corporate-level equal employment opportunity policy statement

A global best practice. This type of commitment to equal opportunity states the intent of the corporation to commit resources and adopt policies and employment practices that are fair and equal.

Course completion

For Engendering Utilities, course completion refers to full, satisfactory and complete participation in the GEELP. The program involves two in-person, one-week workshops; five required virtual classroom

sessions, application of tools provided; and the completion of a group capstone project that entails developing or implementing practices or policies that promote equity within the distribution company (DISCO) where the trainees work.

Distribution company (DISCO)

A regulated electric utility entity, in a competitive business setting, that constructs and maintains the distribution wires connecting a transmission grid to the final customers. This entity makes the distribution service available to all qualified energy service companies on a comparable basis. Engendering Utilities, Phase 3, is working with seven DISCOs in five countries:

1. Electricity Distribution Company (EDCO)–Jordan
2. Eko Electricity Distribution PLC (EKEDP)–Nigeria
3. Energo-Pro–Georgia
4. EVN Macedonia (EVN)–Macedonia
5. Ibadan Electricity Distribution Company (IBEDC)–Nigeria
6. Irbid District Electricity Company (IDECO)–Jordan
7. Kenya Power and Lighting Company (KPLC)–Kenya

(Source: Engendering Utilities, 2017)

Framework

An open set of tools for project planning, design, management and performance assessment. Frameworks help to identify project elements (goals, objectives, outputs, outcomes), their causal relationships and the external factors that may influence success or failure of the project. (Source: MEASURE Evaluation, 2006)

Engendering Utilities uses the following frameworks:

HR best practices framework

An Engendering Utilities tool that provides clear, detailed and evidence-based guidance on specific policies and practices that may be adopted throughout the HR life cycle to promote gender equity within DISCOs and other companies.

Theory of change

A diagram of a set of relationships among factors that are believed to either have an impact on or lead to a target condition. It is the foundation of project design, management and monitoring. Synonym: Conceptual model. For the purposes of Engendering Utilities, the theory of change serves as the conceptual model. (Source: MEASURE Evaluation, 2007)

Results framework

Explains how a project's strategic objective is to be achieved, including those results that are necessary and sufficient, as well as their causal relationships and underlying assumptions. It is usually diagrammed with the main program goal at the top, each of the main objectives in its own box under the goal and the results feeding into each objective from the bottom to the top. (Source: MEASURE Evaluation, 2007)

Gap analysis

Strategic analysis of the current state and the desired future state of gender equity in DISCO, gap analysis and a prioritized implementation plan for moving to the future state. Central to the GEELP is a capstone project that uses the gap analysis as its foundation and consists of a presentation to an expert panel and a brief written report including a one-page executive summary and appendices with all deliverables created throughout the program documenting the process maturity and existing gaps.

Gender

Refers to a culturally defined set of roles, duties, rights, responsibilities and accepted behaviors associated with being male or female, as well as the power relations between and among women and men and boys and girls. The definition and expectations of what it means to be a woman or girl and a man or boy, and sanctions for not adhering to those expectations, vary across cultures and over time, and often intersect with other factors such as race, class, age and sexual orientation. (Source: World Health Organization, 2009)

Gender equality

Gender equality concerns women and men, and it involves working with men and boys, women and girls to bring about changes in attitudes, behaviors, roles and responsibilities at home, in the workplace, and in the community. Genuine equality means more than parity in numbers or laws on the books; it means expanding freedoms and improving overall quality of life so that equality is achieved without sacrificing gains for males or females. (Source: [USAID gender equality and female empowerment policy 2012](#))

Gender equity

The process of reaching equality. To ensure fairness, measures must be taken to compensate for cumulative economic, social and political disadvantages that prevent women and men and boys and girls from operating on a level playing field. (USAID, IGWG, 2009)

Gender Equity Executive Leadership Program (GEELP)

A nine-month executive leadership program run by RTI's project partner, Georgetown University. GEELP is a blended learning solution composed of in-person and online courses, assignments on increasing gender equity in power utilities and in-person and virtual mentoring by an independent industry expert. RTI contracted with Georgetown University's McDonough School of Business and forged this partnership focused on building sustainable capacity among key DISCO leaders to increase women's participation in the electricity distribution workforce. Georgetown University collaboratively designed and customized the GEELP alongside USAID, RTI and Energy Markets Group. Building upon a foundation of core, evidence-based management principles, this program helps participants see how specific practices within the HR life cycle impact gender composition within their organizations. It also provides evidence and tools to demonstrate how unbiased acquisition, development and retention of high-quality employees can foster growth. This program focuses on research that connects good people management to bottom-line results, such as improved performance and reduced turnover, and is aligned with USAID's Best Practices Framework.

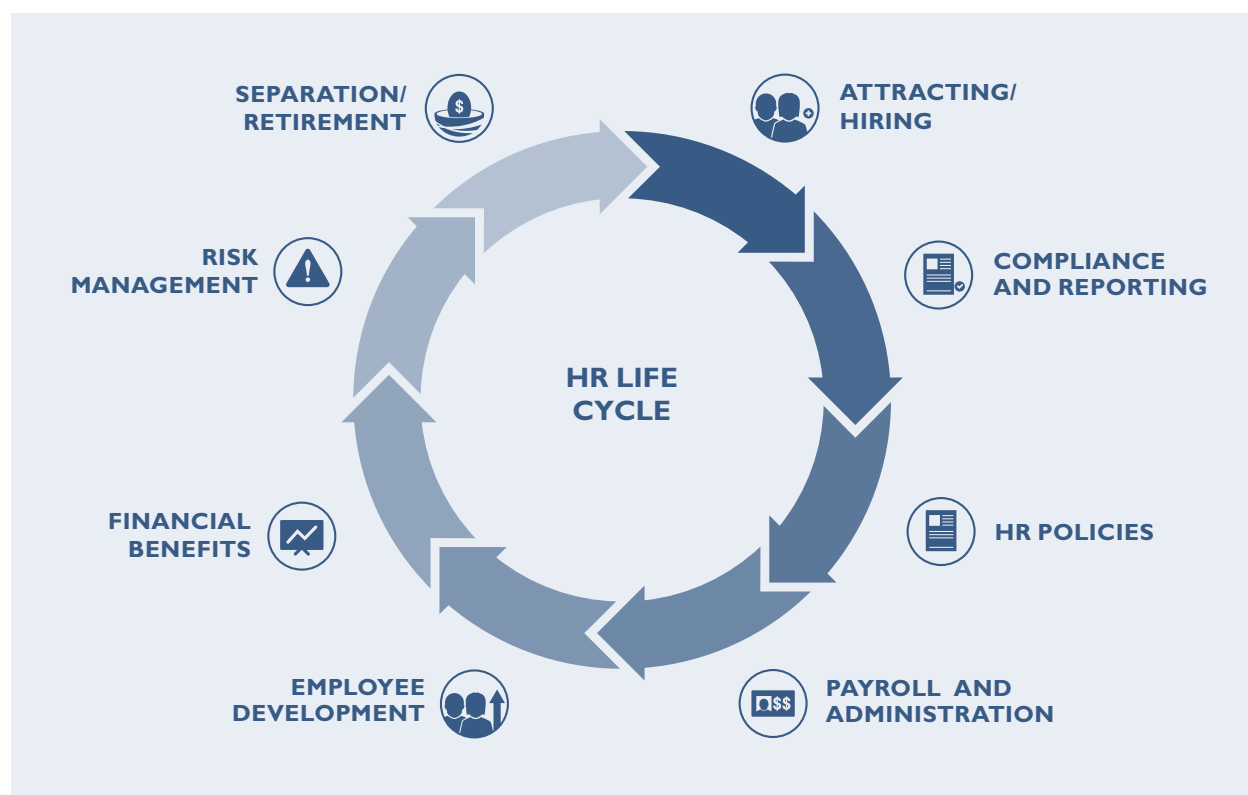
Goal

A broad statement of a desired, long-term outcome of a program. Goals express general program intentions and help guide a program's development. Each goal has a set of related, more specific objectives that, if met, will collectively permit program staff to reach the stated goal. (Source: MEASURE Evaluation, 2007)

The human resource life cycle

HR literature offers several variations on the definition of human resource life cycle. For Engendering Utilities, the employee life cycle refers to the stages of an employee's time in an organization and the shifting roles of the HR function during each of those stages. Figure II-I shows each phase in the life cycle as defined in Engendering Utilities and the connection to gender dynamics:

Figure II-I. HR Life Cycle



Human resources policies

(1) HR policies are essentially the agreements organizations have with employees about expected mutual behavior. Policies must align with laws and contracts, such as union agreements. (2) A system of codified decisions established by an organization to drive administrative personnel functions, salary and benefits, performance management, employee relations and resource planning. The term refers only to the legal documents produced by HR, accepted by the company and disseminated to employees. HR policies are deliberately focused, as they constitute what the company is legally evaluated by in the event of employee grievances.

Human resources practices

HR policies are put into action by daily practices, as practices give HR the broader ability to implement and operationalize policies adopted. Practices are more adaptable than policies and can be changed more quickly to reflect the best of HR actions.

Indicator

A variable that measures one aspect of a program; a project; or a specific population, health or environmental outcome. Indicators should describe a specific behavior, concept or phenomenon. To effectively monitor and evaluate a program or project, implementers should have enough indicators to measure every important aspect of that program or project. Indicators provide clues, signs or markers that measure one aspect of a program and show how close a program is to its desired path and outcomes. They are used to provide benchmarks for demonstrating the achievements of a program. (Source: MEASURE Evaluation, 2007)

In-person module or session

An Engendering Utilities certificate course session that occurs face-to-face in a professional development workshop or classroom setting. In-person modules are inherently synchronous (i.e., all the participating students engage with the same material and instructor at the same time).

Learning community

Professional learning—including the components of the Engendering Utilities training program—within communities requires continuous improvement; promotes collective responsibility; and supports alignment of individual, team, organization and system goals. Learning communities convene frequently throughout the workday to engage in collaborative professional learning that strengthens their practice and increases individual results. Learning community members are accountable to one another to achieve the shared goals of the organization and system and work in transparent, authentic settings that support their improvement. (Source: Learning Forward, 2017)

Learning objective

A statement that defines the expected goal of a curriculum, course, lesson or activity in terms of demonstrable skills or knowledge that will be acquired by a student as a result of instruction. Also known as instructional objective, learning outcome or learning goal.

Module

A segment of the Engendering Utilities curriculum that addresses one or more central learning objectives or core competencies required to complete the course and be awarded a certificate from Georgetown University and Engendering Utilities. Engendering Utilities certificate modules focus on central HR components that are key to supporting women throughout their career/life cycle (see Engendering Utilities theory of change). Modules may be delivered in person in a traditional classroom or workshop setting, or virtually via webinar.

Monitoring, evaluation and learning (MEL) plan

A plan that documents a strategy to measure progress toward results. For Engendering Utilities, it includes a learning agenda, a results framework, indicators, data collection methods, tools and analysis plans, responsibilities and a time frame.

Objective

A statement of desired specific and measurable program results. An objective should be SMART: Specific, Measurable, Attainable, Relevant and Timebound. The elements of the SMART mnemonic are criteria to guide the setting of objectives—for example, in project management, employee-performance management or personal development. (Source: MEASURE Evaluation, 2007)

The Engendering Utilities Phase 3 objectives are stated in Figure II-2:

Figure II-2. Phase 3 Objectives



Online module or session

A set of one-hour virtual classroom sessions that cover a portion of the Engendering Utilities curriculum. Online modules may be synchronous (when in the form of live webinars or virtual classroom sessions) or asynchronous (i.e., self-paced, with independently accessed video lectures, exercises or activities).

Promising approach

A procedure or practice that does not yet have an established base of evidence of its effectiveness or has not risen to the level of an established best practice but has been well received by the intended audience and has produced anecdotal successes among those who implement the procedure or practice. (Source: Engendering Utilities, 2017)

Remuneration

Salary, benefits and bonuses received by employees in exchange for job performance.

Return on equity (ROE)

A measure of a corporation's profitability that reveals how much profit a company generates with the money shareholders have invested. (source: [Investopedia](#), 2018)

Session

A meeting (virtual or face-to-face) that is organized to discuss a particular topic or module. Within Engendering Utilities and the GEELP, sessions are usually educational in nature and attendees are expected to have gained new knowledge or skills by the end.

Sex

The biological characteristics that define humans as female or male. While these sets of biological characteristics are not mutually exclusive, as there are individuals who possess both, they tend to differentiate humans as males and females. (Source: World Health Organization, 2017)

STAR

Mnemonic for an interviewing technique that focuses on behaviors: Situation, Task, Action, Result.

Training

Formal sessions with a clear training agenda, training materials and a time frame. The term encompasses all skill- or knowledge-building efforts that follow a documented curriculum with stated learning objectives and/or expected competencies for the trainees. (Source: USAID, IGWG, 2009)

Utility tracker

The Engendering Utilities Gender Equity Utility Tracker is a multidimensional instrument that assists DISCOs (and other companies or utilities) in tracking their progress toward achieving more equitable workplaces. It allows them to gauge the uptake and implementation of HR best practices alongside measures of gender equity, productivity and profitability.

Webinar

A live, online educational presentation during which participating viewers can submit questions and comments. (Source: Merriam-Webster, 2018)

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ANNEX III: PROFESSIONAL ORGANIZATIONS WITH MEMBER RESOURCES

The Engendering Utilities Best Practices Framework was developed using open-source resources. The following organizations are member-based organizations (with membership dues). These organizations also provide relevant and useful information regarding fostering gender equity through the human resources life cycle for their membership. You can find out more information about these organizations on their websites:

- Association for Talent Development (ATD) <https://www.td.org/>
- Society for Human Resource Management (SHRM) <https://www.shrm.org/>
- Voluntary Protection Programs Participants' Association (VPPPA) <http://www.vpppa.org/>
- Australian HR Institute (AHRI) <https://www.ahri.com.au/>